Gordon CPAs LLC
www.gordoncpasllc.com

Tax Information Organizer

The below information is needed in order to successfully complete you tax return. Please fill in all that apply.

Prior year filing status: Single ☐ Married Jointly ☐ Married Separately ☐ Head of household ☐

Please provide a copy of your prior year's return

Personal Information

Client full name ____

Address ____

City ______________________________ State __________ Zip ______________

Client social security number or tax ID number ______________________DOB____________

Identification: Driver's License ________ State ID ________ Passport/Green Card ________ Other _________

Please upload a pic/copy of your identification (Front and back for driver's license)

Spouse's full name ____

Spouse social security number or tax ID number ______________________DOB____________

If filing a joint return, please also provide spouse's identification

Identification: Driver's License ________ State ID ________ Passport/Green Card ________ Other _________

Please upload a pic/copy of spouse's identification (Front and back for driver's license)

Dependent(s) Information

1st dependent name ____

Dates of birth ______________________ Social security number ______________________

2nd dependent name ____

Dates of birth ______________________ Social security number ______________________

3rd dependent name ____

Dates of birth ______________________________ Social security number ___________________________________

4th dependent name ____

Dates of birth ______________________________ Social security number ___________________________________

5th dependent name ____

Dates of birth ______________________________ Social security number ___________________________________

Please also upload form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

Sources of Income

Please upload documents (in red) where applicable

If employed

Form W-2

Unemployed

Unemployment, state tax refund (1099-G)

Self-Employed

Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099s

Records of all expenses — check registers or credit card statements, and receipts

Business-use asset information (cost, date placed in service, etc.) for depreciation

Office in home information, if applicable

Record of estimated tax payments made (Form 1040–ES)

Rental Income

Records of income and expenses

Rental asset information (cost, date placed in service, etc.) for depreciation

Record of estimated tax payments made (Form 1040–ES)

Retirement Income

Pension/IRA/annuity income (1099-R)

Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)

Social security/RRB income (1099-SSA, RRB-1099)

Savings & Investments or Dividends

Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)

Income from sales of stock or other property (1099-B, 1099-S)

Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)

Expenses related to your investments

Record of estimated tax payments made (Form 1040–ES)

Transactions involving cryptocurrency (Virtual currency)

Other Income & Losses

Gambling income (W-2G or records showing income, as well as expense records)

Jury duty records

Hobby income and expenses

Prizes and awards

Trusts

Royalty Income 1099–Misc.

Any other 1099s received

Record of alimony paid/received with ex-spouse's name and SSN

Types of Deductions

The types of deductions you can take depend a lot on your life situation.

Home Ownership

Forms 1098 or other mortgage interest statements

Real estate and personal property tax records

Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)

All other 1098 series forms

Charitable Donations

Cash amounts donated to houses of worship, schools, other charitable organizations

Records of non-cash charitable donations

Amounts of miles driven for charitable or medical purposes

Medical Expenses

Amounts paid for healthcare insurance and to doctors, dentists, hospitals

Health Insurance

Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)

Childcare Expenses

Fees paid to a licensed day care center or family day care for care of an infant or preschooler

Wages paid to a baby-sitter

Don't include expenses paid through a flexible spending account at work

Educational Expenses

Forms 1098-T from educational institutions

Receipts that itemize qualified educational expenses

Records of any scholarships or fellowships you received

Form 1098-E if you paid student loan interest

K-12 Educator Expenses

Receipts for classroom expenses (for educators in grades K-12)

State & Local Taxes

Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid

Invoice showing amount of vehicle sales tax paid

Retirement & Other Savings

Form 5498-SA showing HSA contributions

Form 5498 showing IRA contributions

All other 5498 series forms (5498-QA, 5498-ESA)

Federally Declared Disaster

City/county you lived/worked/had property in

Records to support property losses (appraisal, clean up costs, etc.)

Records of rebuilding/repair costs

Insurance reimbursements/claims to be paid

FEMA assistance information

Check FEMA site to see if my county has been declared a federal disaster area

Please contact us should you require guidance on any area of this form.

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